

Table of Contents

INTRODUCTION	3
Chapter 1 - Create a New Electronic Nomination Petition	7
Chapter 2 - Create a \$5.00 Qualifying Contribution Form	13
Chapter 3 - Upload a Photo	18
Chapter 4 - Set Up PayPal Account	21
Chapter 5 - Petition Maintenance	29
Chapter 6 - \$5.00 Qualifying Contribution Form Maintenance	35
Chapter 7 – Voter Experience: Electronic Petition	40
Chapter 8 – Voter Experience: Electronic \$5.00 Qualifying Contribution Form	46

INTRODUCTION

E-Qual allows registered voters to securely sign a candidate's nomination petition and/or contribute a \$5 Qualifying Contribution to a participating Clean Elections candidate on the internet. Candidates for **statewide or legislative office** may create an electronic nomination petition using E-Qual and collect signatures electronically from voters that are eligible to sign their nomination petitions. A candidate may collect up to 50% of the minimum number of signatures required for that office utilizing E-Qual. Candidates that choose to participate with the Citizens Clean Elections Commission may create an electronic \$5 Qualifying Contribution Form to collect \$5 contributions from voters. A candidate may collect up to 50% of the minimum number of qualifying contributions required for that office utilizing E-Qual.

[Laws 2011, Ch. 332 Sec. 32]

How it works:

Candidate: A candidate must actively create their own electronic petition and/or \$5 Qualifying Contribution Form - <u>it is not automatically created</u>. The candidate is required to have an active committee set up in the Arizona Secretary of State's Campaign Finance System to access E-Qual to create and manage his nomination petition and/or \$5 Qualifying Contribution Form. The candidate must print his nomination petition and/or \$5 Qualifying Contribution Form from E-Qual to file it with the Secretary of State's Office during the candidate filing period.

Users that have been granted "Administrator" or "Enter & File" rights in the Campaign Finance System may access E-Qual. Please contact the Election Services Division at 602-542-8683 or refer to the Campaign Finance Handbook for assistance with creating a committee or establishing user rights.

Voter: The voter enters his name, birthdate and Arizona Motor Vehicle Division issued Driver License/Identification Card number into E-Qual. This information is verified against the statewide voter registration database. Once the voter is verified as a registered voter, E-Qual determines which nomination petitions the voter is eligible to sign and which candidates the voter is eligible to give a \$5 qualifying contribution based on the voter's registration information. If a voter chooses to sign a petition or give a \$5 contribution, the voter's signature that is on file with the statewide voter registration database is affixed to the nomination petition or \$5 Qualifying Contribution Form. Funds are transferred from the voter to the candidate via PayPal.

Frequently Asked Questions

1. How secure is E-Qual?

Security is very important to the Secretary of State's office. We handle information relayed online with the same commitment given to voters who use EZ Voter, the state's online voter registration program in place since 2002, to ensure a secure environment to conduct these election related transactions. E-Qual utilizes encryption and secured socket layers to transfer and display Web content securely. The data transferred is encrypted so that it cannot be read by anyone except the recipient. This is the same logic and security measures as EZ Voter. The voter will be required to enter his name, date of birth, and Arizona driver license number (AZ DL) or Arizona Identification card number. This information is validated against the statewide voter registration database in real time prior to allowing the voter to sign a petition or contribute a \$5 Qualifying Contribution.

2. How does E-Qual verify the voter?

The voter enters his name, birthdate and driver license/identification number into E-Qual which is verified against the statewide voter registration database. Once the voter is verified, the system knows the party and the district of the voter. E-Qual will check the party of the voter, the district, and how many petitions the voter may have signed electronically when determining which petitions or \$5 Qualifying Contributions to present to the voter.

- 3. Can a voter without an AZ Driver License or Identification Card use E-Qual?

 No. A DL or ID card issued by the Arizona Motor Vehicle Division is required to use E-Qual. Over 95% of all registered voters have an AZ DL or ID card on their voter registration record. The DL or ID card allows the system to access the digitized signature on file with the Statewide Voter Registration Database. Voters without a DL or ID card may use the traditional method of signing paper petitions or \$5 Qualifying Contributions.
- 4. Does the Secretary of State's Office or the Citizens Clean Elections Commission have access to the funds received for \$5 Qualifying Contributions?

No. The Secretary of State's Office and Clean Elections do not have any way to access the funds. All transactions are handled by the voter, PayPal and the candidate.

5. Why do I have to print out the documents if they are maintained by the Secretary of State's Office?

The Secretary of State's Office considers the electronic nomination petitions and \$5 Qualifying Contribution Forms to be owned by the candidate. Our office does not access the information in E-Qual at any time and hard copy forms must be submitted to our office during the candidate filing period. The Secretary of State's Office is not able to print any documents from a candidate's E-Qual account.

6. How many signatures can I collect through E-Qual?

The law allows for a candidate to electronically obtain 50% of the minimum amount of signatures for the office sought. For example, if the minimum amount of signatures for an office is 261, then E-Qual will allow the candidate to collect 130 through the system. It is recommended that a candidate gather enough signatures through traditional paper petitions to give the candidate an adequate buffer.

7. How many \$5.00 Qualifying Contributions can I collect through E-Qual?

The law allows for a candidate to electronically obtain 50% of the minimum amount of \$5.00 Qualifying Contributions for the office sought. For example, if the minimum amount of \$5.00 Qualifying Contributions for an office is 350, then E-Qual will allow the candidate to collect 175 through the system. It is recommended that a candidate gather enough \$5.00 Qualifying Contributions through the traditional paper form to give the candidate an adequate buffer.

8. As a candidate, can I eliminate a signature from my electronic petition?

Yes. Log onto the Campaign Finance system, view your petition, and select "Remove" by any voter that you wish not to be included. Once a signature is removed, a candidate will not be able to retrieve that signature.

9. As a candidate, can I eliminate a \$5.00 Qualifying Contribution from a voter that was made electronically?

Yes. Log onto the Campaign Finance system, view your \$5.00 qualifying contributions, and select "Remove" by any voter that you wish not to be included. If a candidate removes a \$5.00 contribution from the E-Qual system, the candidate/committee is responsible for initiating a refund to the voter through PayPal and ensuring that the Secretary of State's Campaign Finance System is updated accordingly.

10. As a candidate, do I need to have a PayPal account to collect \$5.00 Qualifying Contributions through E-Qual? Yes.

11. Does the voter need to have a PayPal account to give a \$5.00 Qualifying Contribution through E-Qual?

No. The voter will be presented with the options to pay with a credit card/debit card or with his PayPal account.

12.I'm not a participating Clean Elections candidate. Can I still use E-Qual to gather signatures on my nomination petition?

Yes. Candidates may use E-Qual to collect nomination petition signatures even if they are not a participating Clean Elections candidate. Alternately, candidates may choose to collect \$5 Qualifying Contributions and not create an electronic nomination petition.

13. Who is the circulator for nomination petitions in E-Qual? Does the circulator have to sign each petition that is printed from E-Qual?

The candidate is considered the circulator for nomination petitions generated from E-Qual. The circulator does not have to sign each petition, but must sign a circulator cover sheet that is printed with the petitions. The cover sheet and petitions must be filed together at the Secretary of State's Office during the candidate filing period.

14. Can federal and/or local candidates use E-Qual?

No. The law only allows for statewide and legislative candidates to use E-Qual.

15. Can E-Qual be used to gather signatures for initiatives, referenda or recalls?

No. E-Qual can only be used to collect signatures for candidate nomination petitions and/or \$5 Qualifying Contributions.

16.If I need to terminate my committee, do I need to do anything with my electronic petition and/or \$5.00 qualification form?

Yes. As long as there is an open electronic petition or electronic \$5.00 qualification form, you will not be able to terminate your committee. You must first close the open electronic petition or electronic \$5.00 qualification form in order to terminate your committee.

6

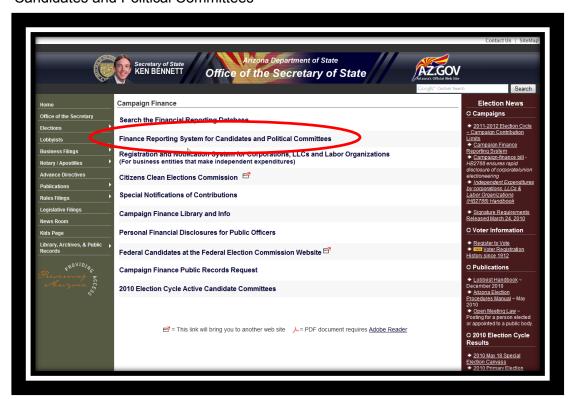
Chapter 1 - Create a New Electronic Nomination Petition

Log onto the SoS Campaign Finance System -

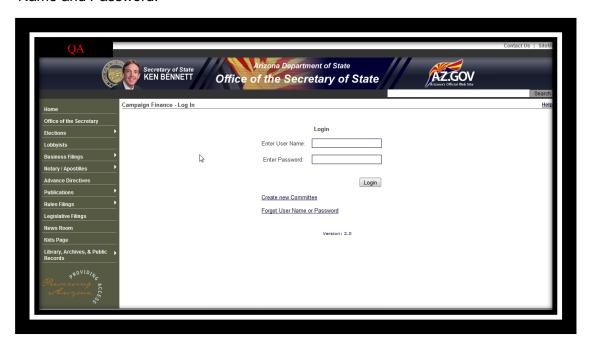
a. Go to <u>www.azsos.gov</u>. Select "Elections" from the left side of the screen and then select "Campaign Finance".



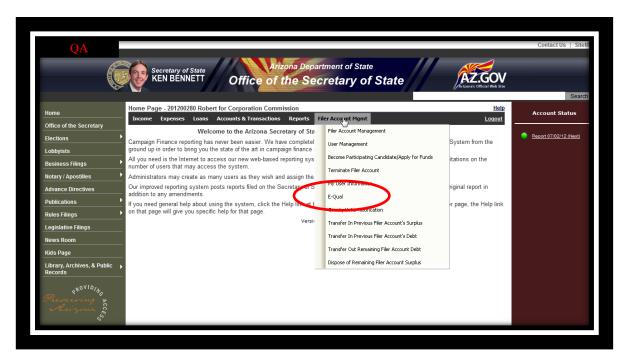
b. Access the Campaign Finance System – select "Finance Reporting System for Candidates and Political Committees"



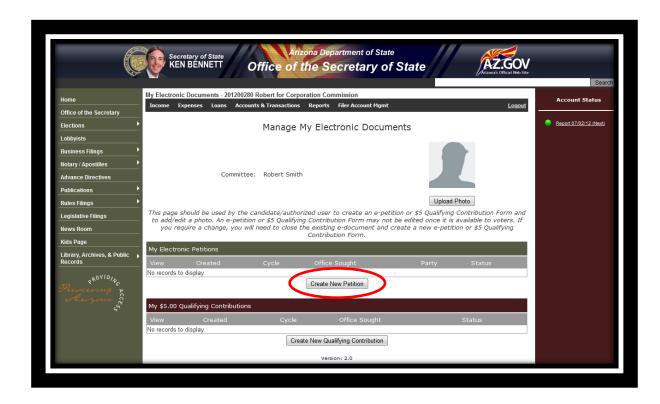
c. Log onto the Arizona Secretary of State Campaign Finance System using your User Name and Password.



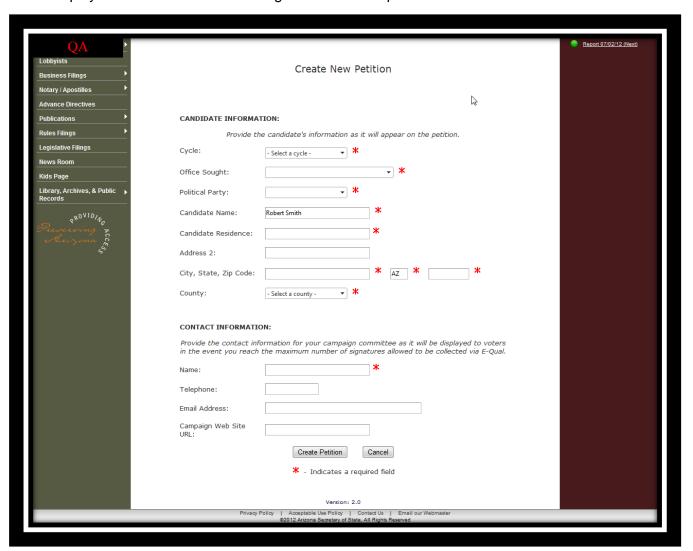
d. Under the Filer Account Management tab, select the option for E-Qual



e. In the "Manage My Electronic Documents" screen, click the "Create New Petition" button.



f. The "Candidate Information" entered on this screen will populate the corresponding fields in the nomination petition. A user should enter the "Candidate Information" exactly as it should appear on the petition. WARNING: A user may not change the "Candidate Information" once the petition is live. The "Contact Information" will be displayed to the voter when viewing the nomination petition.



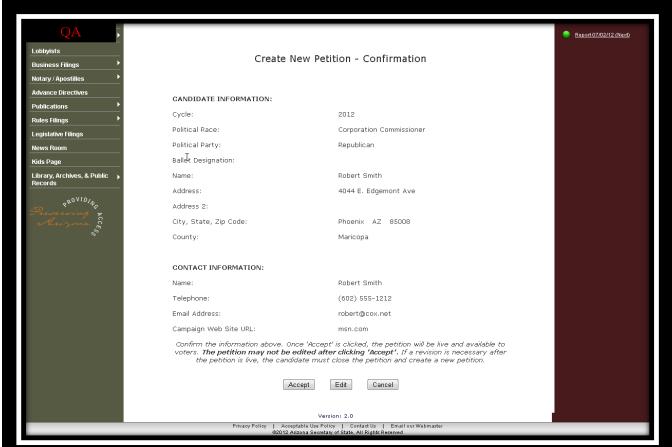
Candidate Information

- 1. Cycle Select the election cycle for which the candidate is running.
- Office Sought Select the office sought from the drop down list of available offices.
- 3. <u>Political Party</u> Select the political party. This selection will determine if the nomination petition created is a Partisan Nomination Petition or a Nomination Petition (For Nomination Other Than by Primary, A.R.S. § 16-341)
- Ballot Designation (only for 16-341 (independent) candidates) enter a
 designation under which name the candidate shall be placed on the official
 ballot. The ballot designation cannot exceed three words.

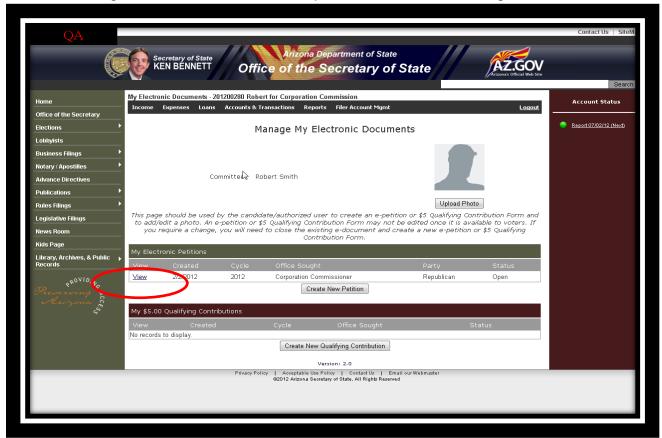
- 5. <u>Candidate Name</u> This field auto-populates based on the committee information in the Campaign Finance System. A user may override the text.
- 6. <u>Candidate Residence</u> Enter the residence address of the candidate.
- 7. Address 2 This field is not required, but will populate on the petition on the same line as the Candidate Residence if text is entered.
- 8. <u>City, State, Zip Code</u> Enter the city, state and zip code of the candidate's residence address.
- 9. County Enter the candidate's county of residence.

Contact Information

- 1. <u>Name</u> Enter the contact name that will display to the voter as the contact for the campaign.
- 2. <u>Telephone</u> (*optional*) Enter the contact telephone number that will display to the voter.
- 3. <u>Email Address</u> (*optional*) Enter the contact email address that will display to the voter
- 4. <u>Campaign Web Site URL</u> (*optional*) Enter the web site URL that will display to the voter
- **g.** Review the confirmation page to check for accuracy. Select "EDIT" to return to the previous screen to change information. If the information is correct, select "ACCEPT" to create the petition and allow voters to sign. Once a petition is live, the candidate information cannot be changed.



h. After clicking "Accept", the user will be taken to the "Manage My Electronic Documents" page. Under "My Electronic Petitions" there is a line item showing the new petition that was created. The "Open" status indicates it is available for voters to sign. Select "View" to see the petition information and signers.

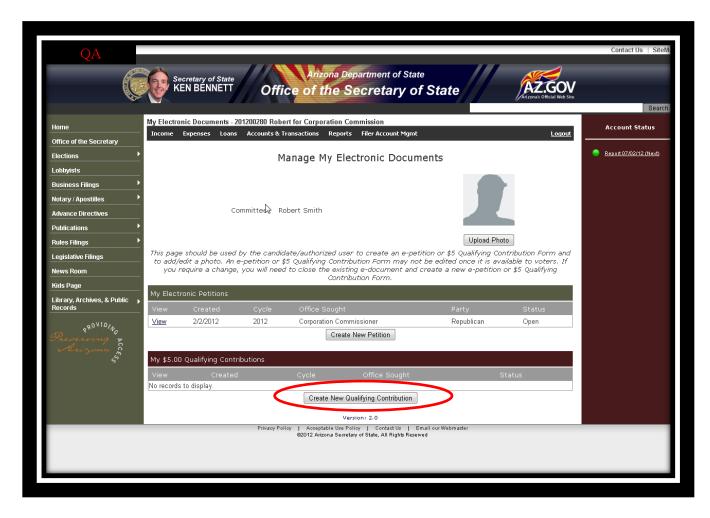


i. Link To: A direct link to the petition may be embedded in the HTML of a candidate's web page. Knowledge of HTML and skills editing web pages are required for this task.

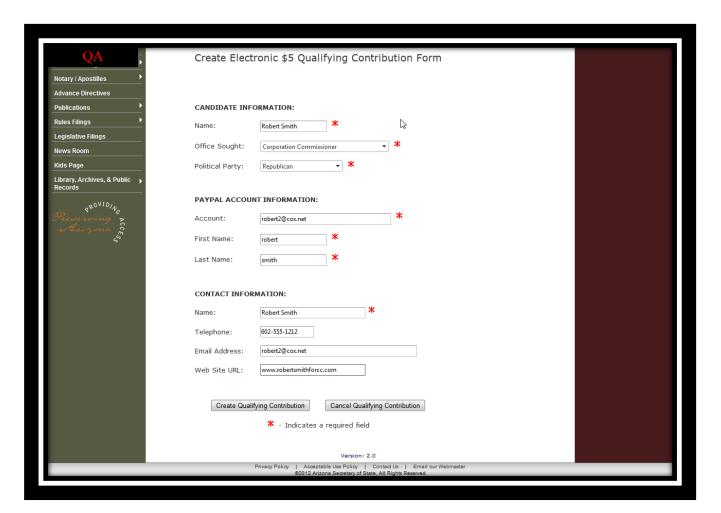


Chapter 2 - Create a \$5.00 Qualifying Contribution Form

Select "Create New Qualifying Contribution" button from the "Manage My Electronic Documents" screen.



a. The "Candidate Information" will populate in the \$5 Qualifying Contribution Form. A user should enter the "Candidate Information" exactly as it should appear on the form. WARNING: A user may not change the "Candidate Information" once the \$5 Qualifying Contribution is live. The "Contact Information" will be displayed to the voter when viewing the \$5 Qualifying Contribution Form.



Candidate Information

<u>Name</u> – This field auto-populates based on the committee information in the Campaign Finance System. A user may override the text.

Office Sought – Select the office sought from the drop down list of available offices.

<u>Political Party</u> – Select the political party.

PayPal Account Information

<u>PayPal Account</u> – Enter the email associated with the candidate PayPal Account <u>PayPal First Name</u> – Enter the first name associated with the PayPal Account <u>PayPal Last Name</u> – Enter the last name associated with the PayPal Account

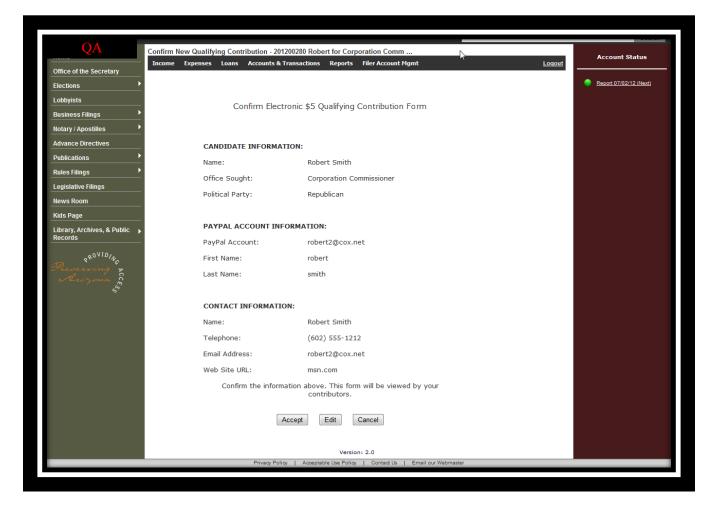
Note: If you do not have a PayPal account, please see <u>Chapter 4</u> of this training manual for instructions on setting up a verified PayPal account.

Contact Information

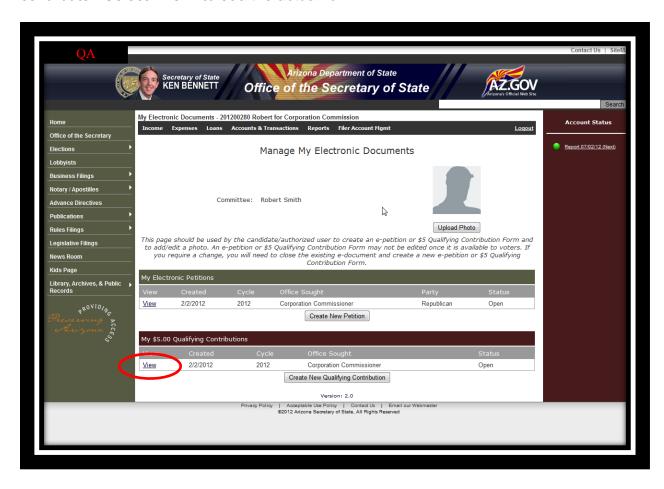
<u>Name</u> – Enter the contact name that will display to voters as the contact for the campaign.

<u>Telephone</u> – Enter the contact telephone number that will display to the voter. <u>Email Address</u> – Enter the contact email address that will display to the voter <u>Campaign Web Site URL</u> – Enter the web site URL that will display to the voter

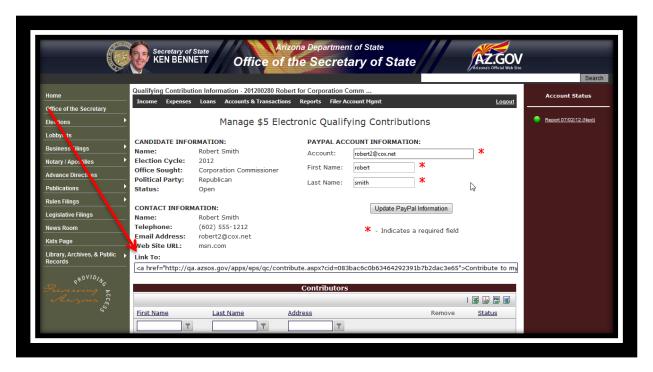
b. Review the confirmation page to check for accuracy. Select "EDIT" to return to the previous screen and correct information. If the information is correct, select "ACCEPT" to create the \$5 Qualifying Contribution Form and allow voters to contribute. Once a \$5 Qualifying Contribution Form is live, the candidate information cannot be changed.



After clicking "Accept", the user will be taken to the "Manage My Electronic Documents" page. Under "My \$5.00 Qualifying Contributions" there is a line item showing the new form that was created. The "Open" status indicates it is available for voters to contribute. Select "View" to see the actual form.

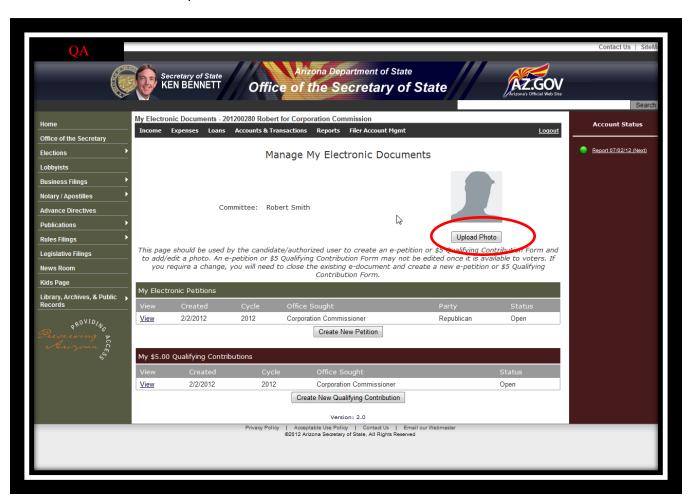


Link To: A direct link to the petition may be embedded in the HTML of a candidate's web page. Knowledge of HTML and skills editing web pages are required for this task.

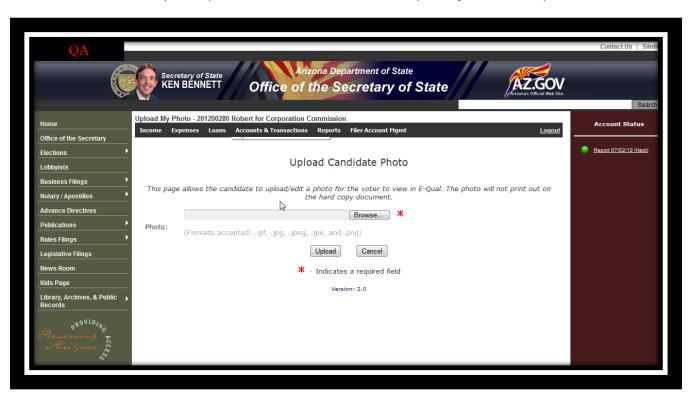


Chapter 3 - Upload a Photo

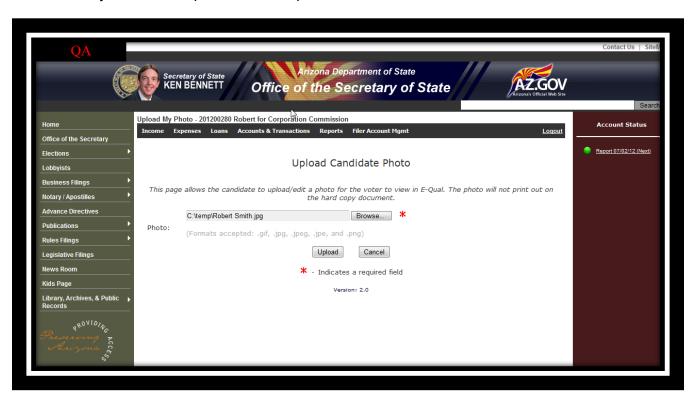
a. Select the button "Upload Photo"



b. A new window opens up. Select "Browse" and find the photo you wish to upload.



c. Once you select the photo, select "Upload".



d. Select "Save" to save picture. The picture will display to the voter on the electronic petition and the electronic \$5.00 Qualifying Contribution Form, but will not print out on the documents.

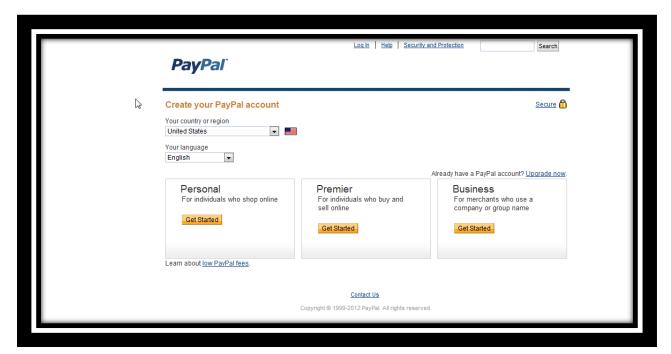


Chapter 4 - Set Up PayPal Account

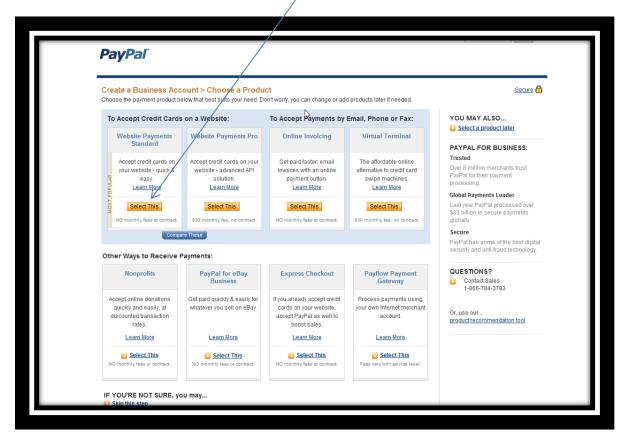
If you do not have a PayPal account that can accept payments already, go to PayPal.com. Select "Sign Up" from the main page. The "Sign Up" link is at the bottom of the "Account Login" section.



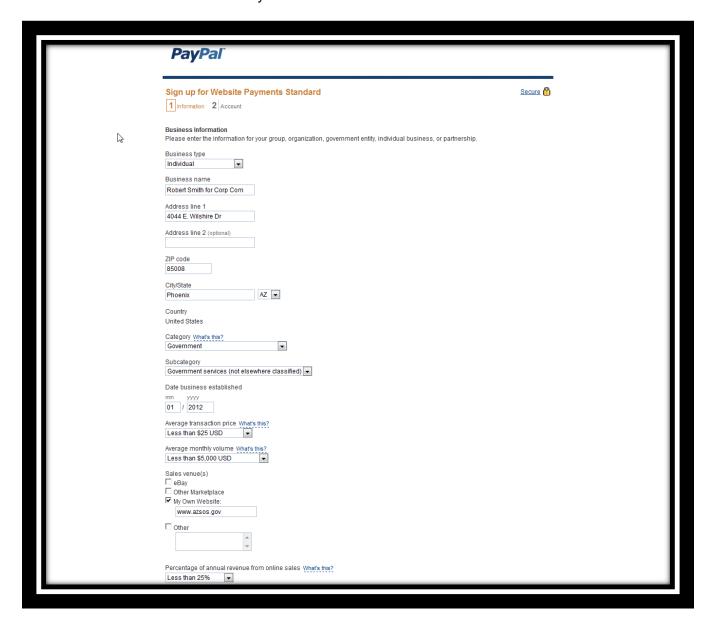
a. Select the type of account



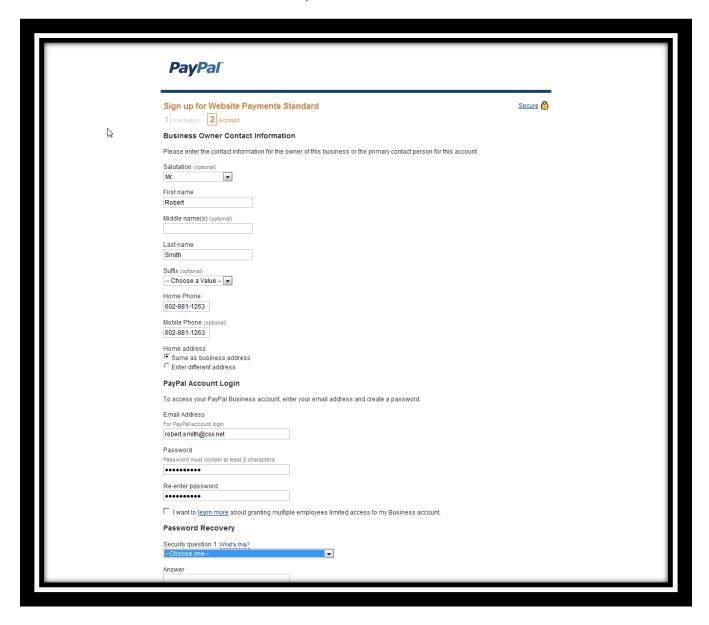
b. Select "Website Payments Standard"



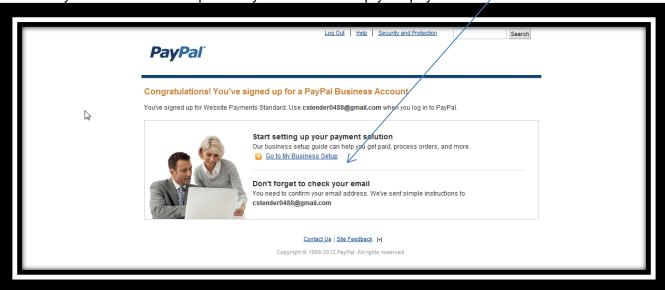
c. Fill out the information for PayPal



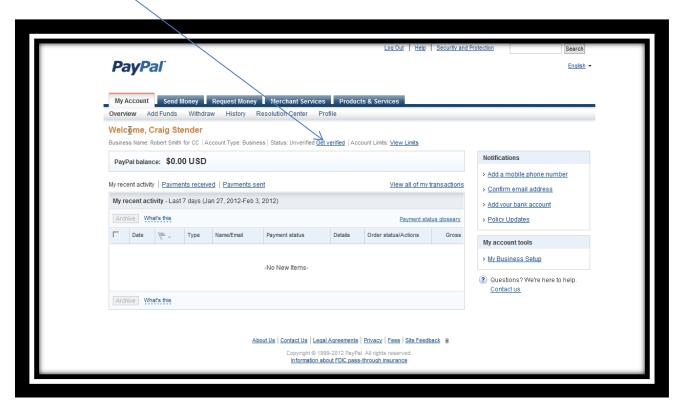
d. Continue to fill out information for PayPal



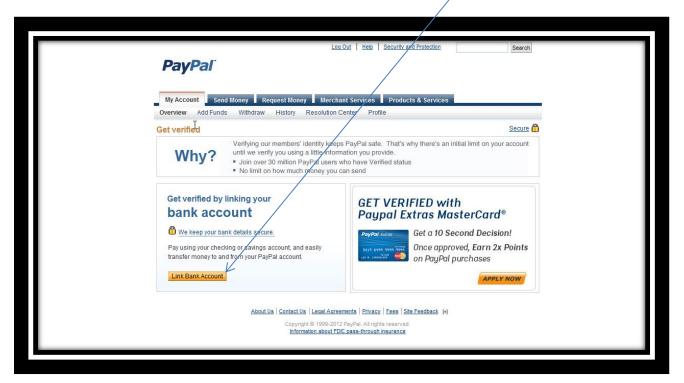
e. PayPal account is set up. Now you need to set up your payment solution.



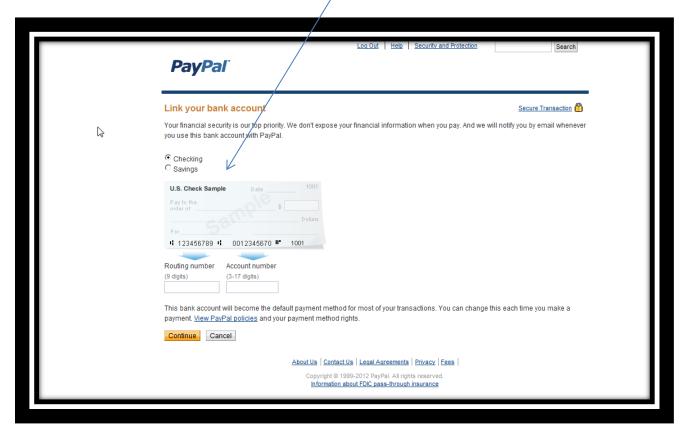
f. The account at this stage is unverified. To use E-Qual, the account needs to be verified. Select "Get Verified"



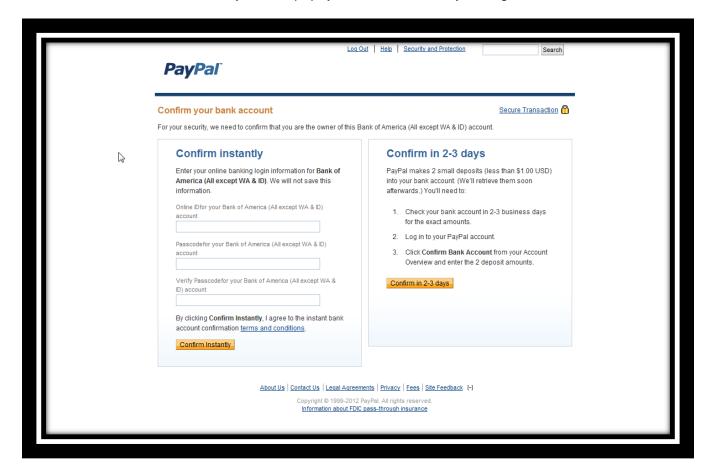
g. Verify your PayPal account by linking it to a valid bank account.



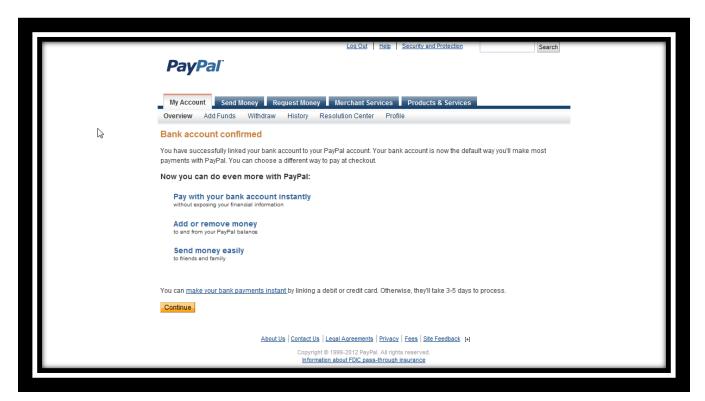
h. Enter in your banking account information



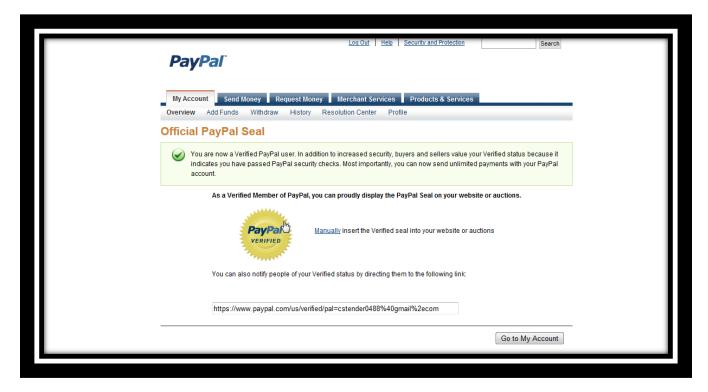
i. Confirm your banking information. Once the information is confirmed, your PayPal account will be verified. Once the PayPal account is verified, your \$5.00 Qualifying Contribution Form is ready to accept payments electronically through E-Qual.



i. This screen shows that the bank account has been confirmed.

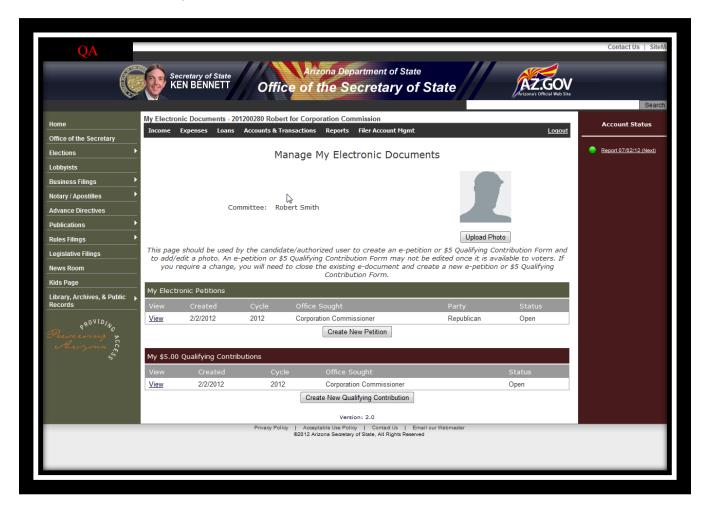


k. PayPal Account is verified. Again, it is necessary for the PayPal account to be verified in order to start collecting \$5.00 contributions through E-Qual.

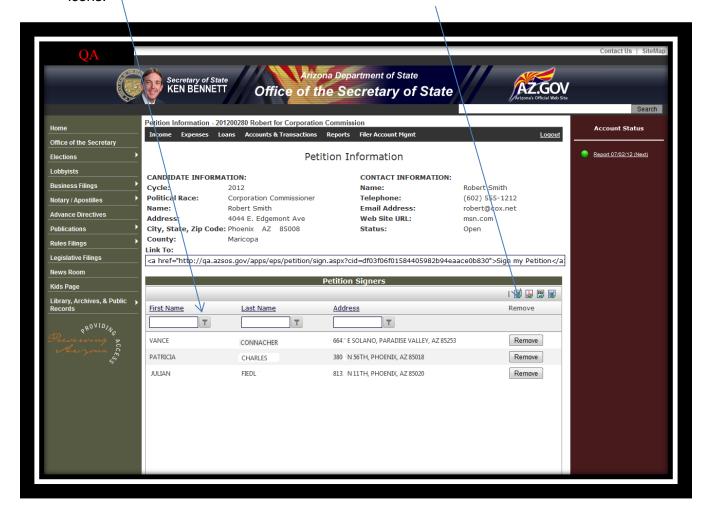


Chapter 5 - Petition Maintenance

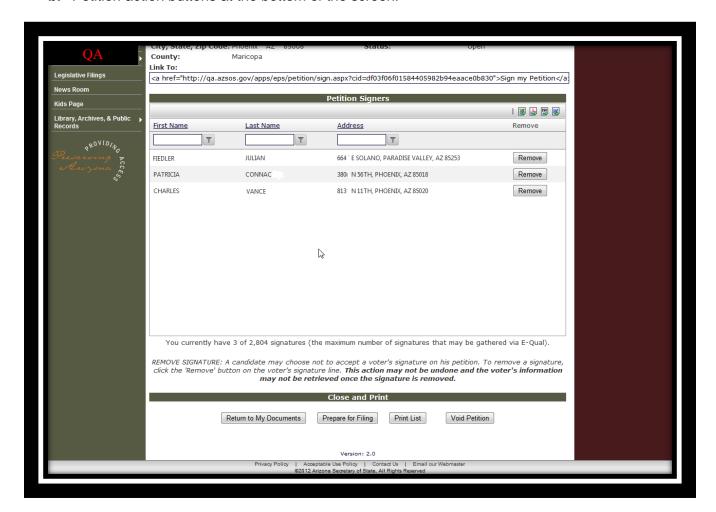
Select "View" under My Electronic Petitions



a. This screen will allow an authorized user to maintain the petition. The "Remove" button located to the right of each signature line will remove a particular voter's signature from the petition. This is similar to crossing out a line on a paper petition. The signers may be sorted by clicking on the filter buttons or the data may be exported using the export icons.



b. Petition action buttons at the bottom of the screen.



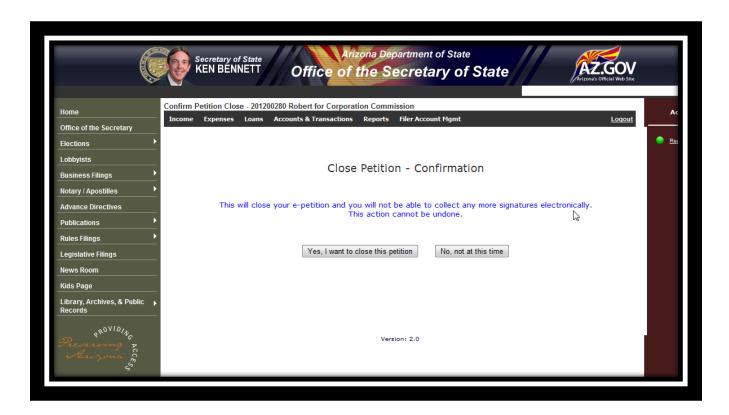
Return to My Documents – This action will take the user back to the main candidate screen.

<u>Prepare for Filing</u> – This action will allow the user to close the petition. This action should be taken when the candidate no longer wishes to collect electronic signatures. At the end of this action, the user will be able to print the electronic petitions. The print out of the electronic petitions along with the traditional paper petitions must be turned in together to the Secretary of State's office during the candidate filing period. **A candidate cannot file electronically**.

<u>Print List</u> – This action is to print a list of people who have signed the candidate petition. This action does not change the status of the petition. The print list from this action is not the official petitions and cannot be turned in as such.

<u>Void Petition</u> – This action is taken if the candidate is no longer running for the office for which the petition was opened. This action will cancel the petition and free those voters who signed the voided petition to sign another candidate's petition.

c. This is the screen that appears if the authorized user selected "Prepare for Filing". The system will ask the user to confirm that they want to close the petition. The action of closing the petition cannot be undone after the user confirms that is what they wish to do.



d. The petition is closed. The ability to print the petition appears. Select "Yes, I want to print this Petition".

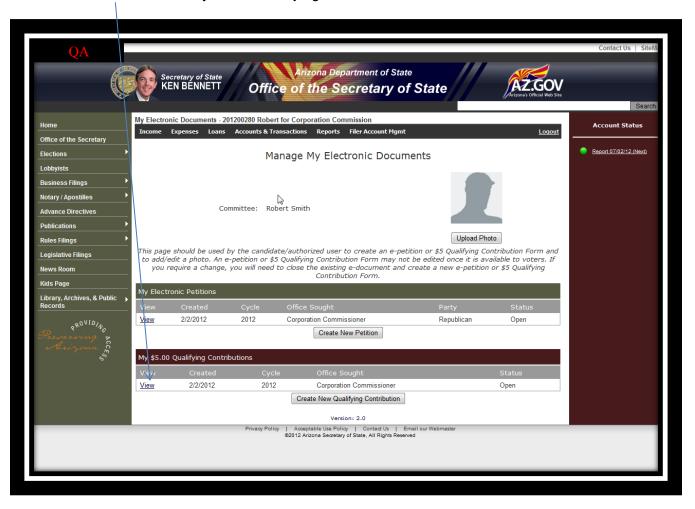


e. The system will prepare the petition and show it on the screen. The document is made up of three parts. The first part is a Circulator Cover Sheet. This cover sheet must be signed by the candidate and submitted with the petitions to the Secretary of State's Office. The second part is a report on the number of signatures. The third part is the petition pages. The candidate should submit two stacks of petitions to the Secretary of State's Office, those generated from E-Qual and the traditional paper petitions.

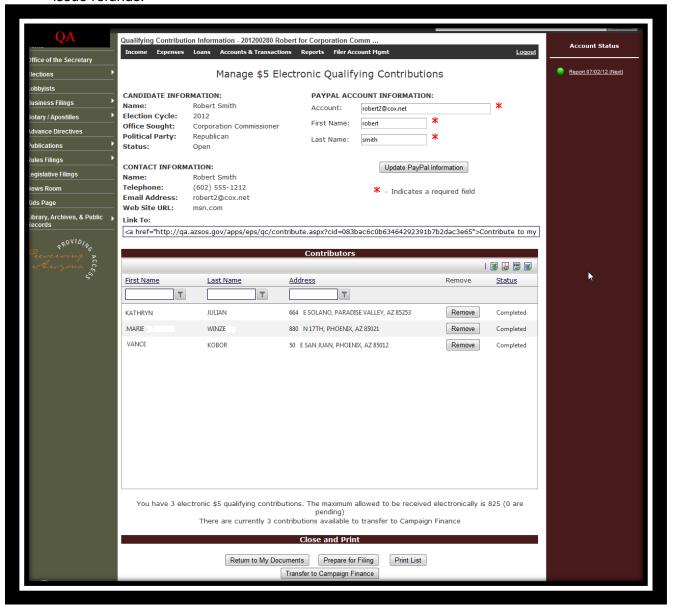
Circulator Cover Sheet Partisan Instructions for Circulator 1. By signing the Circulator Cover Sheet, and by utilizing the Secretary of State's EQual System, the Candidate agrees to act as the circulator for all petitions generated from the Secretary of State's E-Qual System. 2. The Candidate is not required to sign each petition that was generated from the Secretary of State's E-Qual System. 3. The Candidate shall sign a Circulator Cover Sheet generated from the Secretary of State's E-Qual System, which contains a Petition ID # on each petition generated, and submit it to the Secretary of State's Office at the time of filing the corresponding nomination pettions. 4. The candidate acknowledges that all petitions circulated outside of the Secretary of State's E-Qual System must be signed by the circulator as prescribed by A.R.S. § 16321(D) and must otherwise conform to the requirements of A.R.S. §§ 16-314 and 16-315. Circulator Verification Robert Smith , hereby verify that the following petitions. , were obtained through the Secretary of State's E identified by Petition ID # 15 Qual System, and that each of the names on the petition(s) was signed via the Secretary of State's E-Qual System on the date indicated: that in my belief, because the signatures were gathered via the Secretary of State's E-Qual System, each signer was a qualified elector who resides at the address given as their residence on the date indicated. I further verify that each signer is a member of the party from which the candidate is seeking nomination, or the signer is a member of a political party that is not entitled to continued representation on the balot, or the signer is registered as independent or no party preferred. Signature of Circulator Robert Smith Typed or Printed Name of Circulator 4044 E. Edgemont Ave Circulator's Actual Residence Address (If no street address, a description of residence location shall be included on the petition)

Chapter 6 - \$5.00 Qualifying Contribution Form Maintenance

a. Select "View" under My \$5.00 Qualifying Contributions



b. This screen will allow an authorized user to maintain the \$5.00 Qualifying Contribution Form. The remove button located to the right of each contributor will remove that contributor from the candidate's form, but will <u>not</u> generate a refund. A candidate is responsible for initiating refunds through PayPal; E-Qual does not have the capability to issue refunds.



Petition action buttons at the bottom of the screen.

Return to My Documents – This action will take the user back to the main candidate screen.

<u>Prepare for Filing</u> – This action will allow the user to close the contribution form. This action should be taken when the candidate no longer wishes to collect electronic \$5 Qualifying Contributions. At the end of this action, the user will be able to print the electronic contribution forms. The print out of the electronic contribution forms along with the paper

forms must be turned in together to the Secretary of State's office during the candidate filing period. **A candidate cannot file electronically**.

<u>Print List</u> – This action is to print a list of people who have contributed electronically. This action does not change the status of the contribution form. The print list from this action is not the official contribution form and cannot be turned in as such.

<u>Transfer to Campaign Finance</u> – This action is taken if the candidate would like to transfer the contributor information over to the Campaign Finance System. This action allows the data to be transferred electronically, instead of being manually entered by the candidate.

c. To close the \$5 Qualifying Contribution Form, select "Yes, I want to close this qualifying contribution"



NOTE: The voter is charged \$5.47 for the transaction. The 47 cents is for the candidate to cover the PayPal transaction. The PayPal transaction amount will differ depending if the voter used a credit card, PayPal Account, checking account, or debit card to pay. It is possible that the candidate will end up with extra funds from the 47 cents per transaction after paying PayPal. The extra amount by Clean Elections Rules should be included in the payment from the Candidate to Clean Elections.

d. The electronic qualifying contribution form is closed. Select "Yes I want to print this qualifying contribution" to print the report for filing at the Secretary of State's Office.

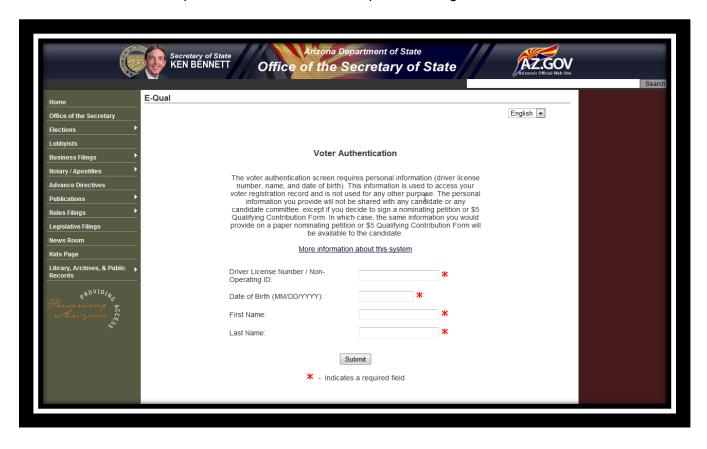


e. Print out the official "Electronic \$5 Qualifying Contribution Report".

Page	÷ 1	Electronic \$5	Qualifying Contribution Report		
Cano	didate Name: Robert Smith		Office Sought: Corporation Commissioner		OFFICE OF
	Contributior's Name	Signature of Contributor	Voter Registration Address	Date of Contribution	County Voter ID
1.	VANCE MILBURN	O are Juia	6647 E SOLANO, PARADISE VALLEY, AZ 85253	02/02/2012	100043895
2.	JULIAN, KATHRYN MICHELLE	Hathyu Foson	509 E SAN JUAN, PHOENIX, AZ 85012	02/02/2012	100006105.
3.	MARIE JEANETTE-	franthis Winselson	8808 N 17TH, PHOENIX, AZ 85021	02/02/2012	100201166

Chapter 7 – Voter Experience: Electronic Petition

The following screens are what the voter experiences when signing a petition electronically. The voter must enter his driver license number, date of birth, first name and last name to access E-Qual. All four criteria must match in order to access the voter registration record so the user may proceed. Once the information is matched and the voter registration record is accessed, E-Qual knows the district, party and other registration information about the voter. The voter registration record determines which petitions E-Qual will present to the voter. E-Qual will not allow a voter access to a petition that the voter is not qualified to sign.



a. The system will ask the voter if his address is still correct. The system will show a partial address that can be recognized by the voter, but does not show the entire address for privacy and security reasons. The address is from the voter registration record. If it is still accurate, the voter will select "Yes" below. If it is not, and the user selects "No", instructions will be given to the voter on how to update his voter registration.

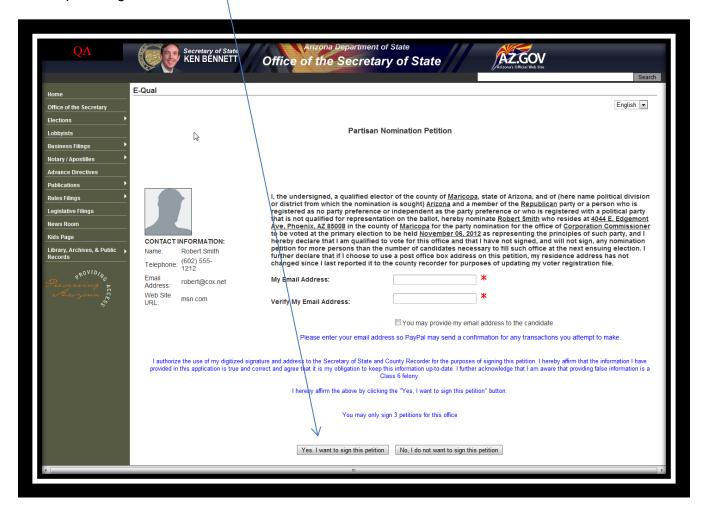


b. E-Qual will show all the petitions the voter is qualified to sign based on the voter's registration record. The system will only show petitions for those candidates that have chosen to create an electronic petition in E-Qual.

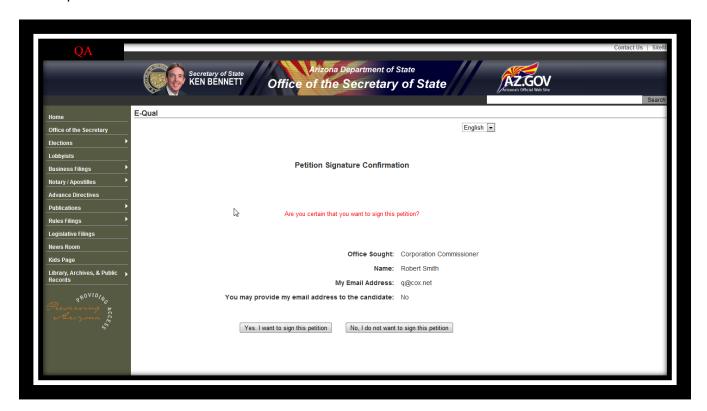
The status of the candidate's petition is displayed on the right. The voter may view the petition by clicking on the candidate's name.



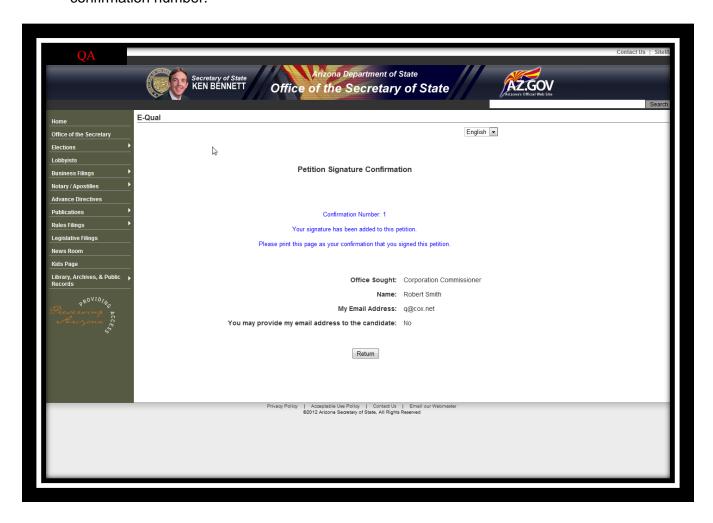
c. After clicking on the candidate's name, the voter is able to view the petition language and the contact information for the candidate. To sign the candidate's petition, the voter must click the "Yes, I want to sign this petition" button. The voter has the option of providing his email address to the candidate.



d. The voter will receive a confirmation page asking if they are sure they wish to sign the petition. If the voter selects "Yes", his signature will be placed on the candidate's petition.

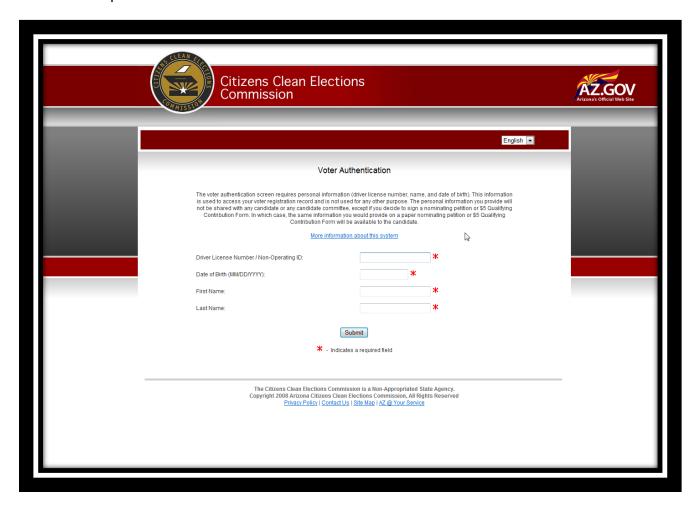


e. The confirmation page tells the voter the transaction is complete and provides a confirmation number.



Chapter 8 – Voter Experience: Electronic \$5.00 Qualifying Contribution Form

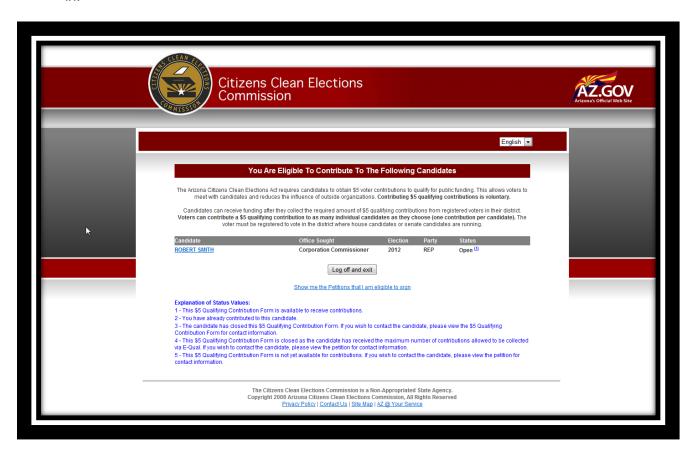
The following screens are what the voter experiences when contributing a \$5 Qualifying Contribution Form electronically The voter must enter his driver license number, date of birth, first name and last name to access E-Qual. All four criteria must match in order to access the voter registration record so the user may proceed. Once the information is matched and the voter registration record is accessed, E-Qual knows the district of the voter and which candidates to present to the voter.



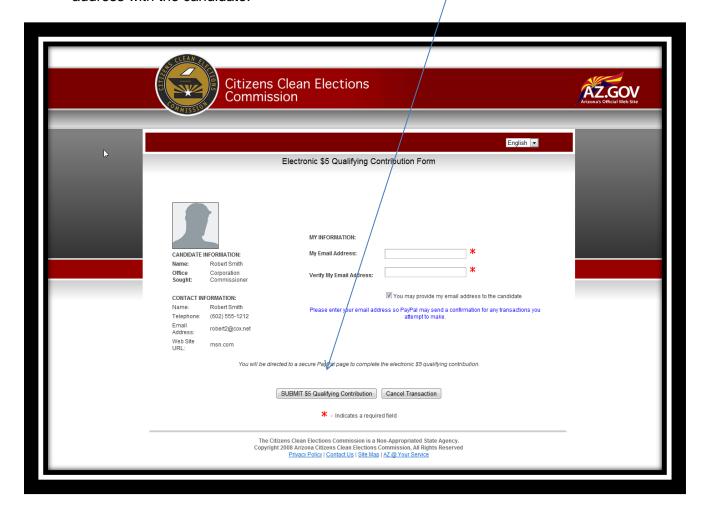
a. The system will ask the voter if his address is still correct. The system will show a partial address that can be recognized by the voter, but does not show the entire address for privacy and security reasons. The address is from the voter registration record. If it is still accurate, the voter will select "Yes" below. If it is not, and the user selects "No", instructions will be given to the voter on how to update his voter registration.



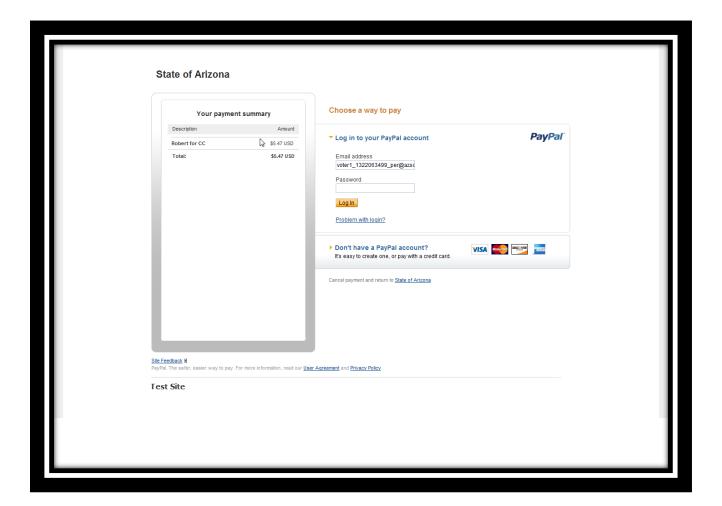
b. The system shows all the candidates that the voter is qualified to contribute to. The system will show all statewide and legislative candidates within the district the voter lives in.



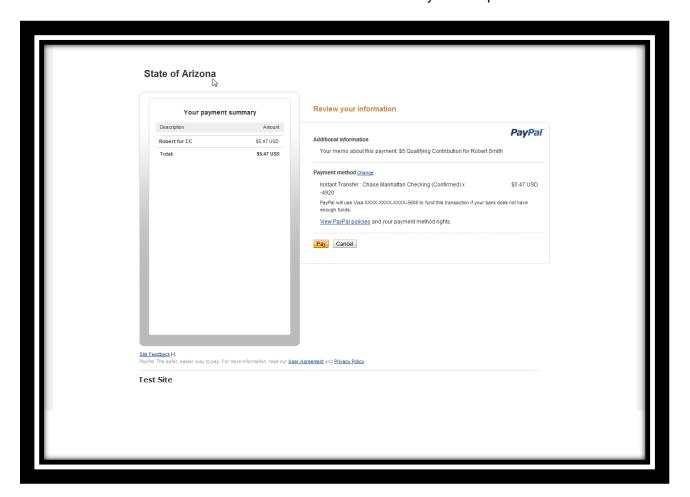
c. To contribute to the candidate, the voter must click the "SUBMIT \$5 Qualifying Contribution" button and enter an email address. The email address is used to send a receipt for the \$5.00 Qualifying Contribution. The voter may choose to share the email address with the candidate.



d. The voter is taken to the PayPal payment screen. The voter can pay with their own PayPal account or with a credit or debit card.



e. The voter confirms his or her information and clicks "Pay" to complete the transaction.



f. The transaction is complete. The voter sees that the payment was submitted and will be notified by email if the transaction was successful. The voter is given the option to do other transactions.

